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Ontario's Overseas Travel Markets - 2000

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HIGHLIGHTS

Overseas Travel to Ontario – 2000

- In 2000, 2.287 million visitors from overseas countries visited Ontario. Of these visitors, 1.965 million stayed in Ontario for one or more nights. This level of visitation accounted for 50% of Canada's total overseas visitors and for 45% of the country's overnight overseas visitors in 2000.

- Overseas visitors spent $2.5 billion in Ontario in 2000, or an average of $1,082 per person visit. This level of spending accounted for 35% of total overseas spending in Canada. When combined with the $3.9 billion that Ontarians spent in overseas countries in 2000, this level of receipts yields a deficit in Ontario's overseas tourism account of $1.4 billion.

- The U.K. generated the largest share of overseas visitors and of those who spent at least one night in Ontario (21%), followed by Japan (10%), Germany (8%) and France (7%).

- Entry into Canada directly from overseas countries by air accounted for 67% of Ontario's overseas visitors, while entry via the United States by air accounted for a further one-fifth (21%) of the province's overseas visitors.

- More overseas residents who visited Ontario during 2000 were on pleasure trips (43%) than travelled for any other single reason. Visitors who took their trips for the purpose of visiting friends or relatives accounted for 33% of Ontario's overseas visitors, while business travellers accounted for 20%. The same trip purpose pattern is evident among overseas overnight visitors to Ontario in 2000.

- The average overseas visitor to Ontario stayed in the province for 7.8 nights, travelled in groups of 1.8 persons, most of which were comprised by adults only (91% of the overseas visitors to Ontario travelled in adults-only groups) and was about 42 years old.

- Most of the 17.7 million person nights in the province by overseas visitors were spent in non-commercial accommodation (56% or 9.9 million person nights in private homes or private cottages). A further 4.7 million person nights were spent in roofed commercial accommodation such as hotels, motels or commercial cabins/cottages. Additionally, 360,000 nights were spent in campgrounds or trailer parks by overseas visitors.

- Shopping was the most popular activity of overnight overseas visitors to Ontario (82%), followed by sightseeing (78%), visiting friends or relatives (61%) and visiting parks or historic sites (50%).

- Over half of Ontario's overseas visitors rated Canada as better than their home country for the hospitality of the local population (52%). A similar proportion rated Canada favourably for value for money (47%) but a sizeable minority declared that Canada offers worse value than their place of residence (22%). Concerns about value are especially evident among visitors from continental Europe. Transportation services, accommodation services and the variety of things to see and do were rated as better than or the same in Canada as back home.

- Most of the same day visits to Ontario were to Metro Toronto and Festival Country. These two regions, along with Ontario East, were also the most popular for overnight visits from overseas countries (Metro Toronto, 67%; Festival Country, 32%; Ontario East, 27%). Northern Ontario as a whole received 5% of Ontario's total overnight overseas visitors.

- Of Ontario's travel regions, Metro Toronto not only received the largest share of overseas expenditures in Ontario (67%), but its visitors also had the highest average spending per person visit. This region attracts a disproportionately high number of business travellers. It is also the "reception" point for many overseas travellers because it has Canada's largest international airport. Substantive airfares accrue to the region because many overseas travellers use Toronto as their point of entry/exit. These factors likely explain the high volume and average spending in this region.

Comparison of Key Findings: 1994 through 2000

Travel to Ontario from Overseas Countries

- Total visitation to Ontario from overseas countries increased by 7% between 1999 and 2000. The 2.287 million overseas visitors in the province in 2000 represent a five percent increase over 1994 (2.168 million). With the exception of the U.K., most of the growth in Ontario's overseas markets between 1994 and 2000 came from non-traditional markets such as Australia (+33%), Mexico (+60%), Hong Kong and South Korea (+26% each).

- There has been growth in visitors from the U.K. between 1994 to 2000 (+21%) but other major European markets such as France (-28%) and Germany (-17%) have declined over this period. Japan, still recovering from the financial crisis that has persisted over much of the past decade, continues to perform below 1994 levels (-23%).

- As a consequence of an increase in visitation, total spending in Ontario by overseas visitors increased between 1994 and 2000 by 21.8% in constant 1992 dollars.

- At $2,475 million, total spending by overseas visitors in Ontario in 2000 increased by 14% over 1999, primarily as a result of substantial increases in air carrier accruals to the province. These fares increased by 29% between 1999 and 2000 and now represent over one-third of all spending by overseas visitors in the province (35%).

- Average spending per person visit (in constant 1992 dollars) increased by 15.4% from $709 in 1994 to $819 in 2000.

- Overseas visitors in 2000 closely resemble those who came to the province in 1999 with respect to their length of stay in the province. Over 8-in-10 continue to spend at least one night in the province, with an average length of stay of 7.8 nights (all overseas visitors) in 2000.

- The current inbound overseas market is somewhat more likely to spend nights in the province now (86%) than was the case in 1994 (83%). Furthermore, the length of stay in the province by overnight overseas visitors has been increasing incrementally, from 7.9 nights in 1994 to 9.0 nights in 2000.

- While "pleasure" continues to be the dominant trip purpose among overseas visitors (43%), this motivation has been declining steadily since 1994 when it represented half of

the overseas market (51%). Conversely, trips to see friends and relatives have been increasing over the same time period – from 29% in 1994 to 33% in 2000. Business travel in 2000 is at about the same level that it has been over the past couple of years, currently accounting for one-fifth of overseas travel in Ontario.

- Hotels remain the most popular form of lodging among overseas visitors in Ontario. Half of these overnight visitors spend at least one night in a hotel during their stay in the province.

- As the proportion of overseas visitors in Ontario on trips to visit friends and relatives increases, there is a coincident increase in the proportion of visitors who rely on friends and relatives for accommodation over time, from 39% in 1994 to 43% in 2000.

- Ontario's overseas overnight visitors have maintained a very consistent activity pattern over the years. In 2000, they are as likely to engage in sightseeing, visit a park or historic site, go to a museum, zoo or natural display, and/or dine in a restaurant while travelling in Canada as they were in previous years.

- There are no differences in the region-to-region pattern of overseas travel within the province over the past year. Metro Toronto attracted 7-in-10 overseas visitors' stops in 1999 and continues to attract this level in 2000 (71%). Similarly, 4-in-10 overseas visitors stopped for a night or took a day excursion to Festival Country in 1999 and in 2000 and close to 3-in-10 stopped in Ontario East in each of these years (27%).

POINTS SAILLANTS

Les visiteurs d'outre-mer en Ontario – 2000

- En 2000, 2,287 millions de visiteurs provenant de pays d'outre-mer sont venus visiter l'Ontario. Sur ces visiteurs, 1,965 million sont restés au moins une nuit. Ce taux de visites correspond à 50 % du nombre total de visiteurs d'outre-mer au Canada et à 45 % du nombre de visiteurs d'outre-mer au Canada étant restés au moins une nuit en l'an 2000.

- Les visiteurs d'outre-mer ont dépensé 2,5 milliards de dollars en Ontario, en l'an 2000, soit une moyenne de 1 082 $ par visite-personne. Ce taux de dépenses correspond à 35 % de toutes les dépenses effectuées par des visiteurs d'outre-mer au Canada. Lorsque l'on compare ce nombre aux 3,9 milliards de dollars que les Ontariens ont dépensé en voyageant outre-mer en l'an 2000, on constate un déficit de 1,4 milliard dans le tourisme en provenance d'outre-mer, en Ontario.

- Le Royaume-Uni a généré le plus grand nombre de visiteurs ainsi que le plus grand nombre de visiteurs étant restés au moins une nuit en Ontario (21 %), suivi du Japon (10 %), de l'Allemagne (8 %) et de la France (7 %).

- Le nombre de visiteurs venus au Canada par avion directement d'un pays d'outre-mer, correspondait à 67 % des visiteurs d'outre-mer de l'Ontario, alors que le nombre de visiteurs en provenance des États-Unis venus par avion au pays correspondait à un cinquième (21 %) du nombre de visiteurs d'outre-mer de la province.

- En l'an 2000, un plus grand nombre de visiteurs d'outre-mer sont venus en Ontario pour faire un voyage de plaisance (43 %) plutôt que pour toute autre raison. Les visiteurs effectuant leur voyage dans le but de rendre visite à leurs amis ou à leur famille ont compté pour 33 % des visiteurs d'outre-mer de l'Ontario, alors que les visiteurs venus en voyage d'affaires ont compté pour 20 %. Ces pourcentages ont conservé les mêmes proportions chez les visiteurs d'outre-mer ayant passé au moins une nuit en Ontario, en l'an 2000.

- En moyenne, les visiteurs d'outre-mer sont restés en Ontario pendant 7,8 nuits; ils ont voyagé en groupes de 1,8 personne, lesquels étaient principalement constitués d'adultes (91 % des visiteurs d'outre-mer de l'Ontario ont voyagé en groupes d'adultes seulement) et avaient environ 42 ans.

- La majorité des 17,7 millions de nuits-personnes des voyageurs d'outre-mer ont été passées dans des logements non commerciaux (56 % ou 9,9 millions de nuits-personnes dans des maisons ou des chalets privés). De plus, 4,7 millions de nuits-personnes ont été passées dans des logements commerciaux tels que des hôtels, motels et cabanes ou chalets commerciaux. En outre, 360 000 nuits ont été passées dans des terrains de camping ou des terrains de roulottes.

- Le magasinage a été l'activité la plus populaire des visiteurs d'outre-mer étant restés au moins une nuit en Ontario (82 %), suivi du tourisme (78 %), des visites chez des amis ou de la parenté (61 %) et des visites de parcs ou de sites historiques (50 %).

- Plus de la moitié des visiteurs d'outre-mer de l'Ontario ont affirmé que les Canadiens offraient un accueil plus hospitalier que la population de leur pays respectif (52 %). Un nombre similaire de visiteurs ont accordé une note favorable au Canada en ce qui a trait à la valeur de leur argent (47 %), mais une minorité importante de visiteurs a déclaré que le Canada offrait une valeur moindre que leur lieu de résidence respectif (22%). Les visiteurs en provenance de l'Europe continentale s'intéressaient particulièrement à la valeur de leur argent. Les visiteurs d'outre-mer ont donné aux services de transport et d'hébergement, ainsi qu'à l'éventail de choses à voir et à faire au Canada, une cote supérieure ou égale à celle de leur lieu de résidence.

- C'est la région du grand Toronto et la région des festivals qui ont reçu le plus grand nombre de visites d'une journée. Ces deux régions, ainsi que l'Est de l'Ontario, étaient également les plus populaires pour les voyages de plus de 24 heures en provenance des pays d'outre-mer (grand Toronto : 67 % ; région des festivals : 32 % ; Est de l'Ontario : 27 %). Le Nord de l'Ontario a reçu 5 % du nombre total de visites d'outre-mer de plus de 24 heures dans la province.

- De toutes les régions touristiques de l'Ontario, le grand Toronto a non seulement bénéficié de la plus grande part des dépenses des visiteurs d'outre-mer en Ontario (67 %), mais la moyenne des dépenses de ses visiteurs était aussi la plus élevée par visite-personne. Cette région attire, de façon disproportionnée, le plus grand nombre de visiteurs en voyage d'affaires. C'est également le « point de réception » de nombreux voyageurs d'outre-mer puisque la région du grand Toronto abrite le plus grand aéroport international au Canada. Le nombre de vols atterrissant à Toronto a été caractérisé par une croissance notable, puisque de nombreux voyageurs d'outre-mer en font leur point d'entrée ou de sortie. Tous ces facteurs expliquent sans doute le volume élevé de voyageurs et la moyenne élevée des dépenses effectuées dans cette région.

Comparaison des résultats clés : de 1994 à l'an 2000

Les visiteurs des pays d'outre-mer en Ontario

- Le nombre total de visites en Ontario en provenance des pays d'outre-mer a augmenté de 7 % entre 1999 et 2000. Les 2,287 millions de visiteurs d'outre-mer dans la province, en l'an 2000, représentent une augmentation de 5 % par rapport à 1994 (2,168 millions). À l'exception du Royaume-Uni, la plus grande partie de la croissance des marchés d'outre-mer en Ontario, entre 1994 et 2000, est attribuée à des marchés non traditionnels tels que l'Australie (+ 33 %), le Mexique (+ 60 %), Hong Kong et la Corée du Sud (+ 26 % chacun).

- Il y a eu une augmentation du nombre de visiteurs du Royaume-Uni entre 1994 et 2000 (+ 21 %); cependant d'autres pays importants de l'Europe, tels que la France (- 28 %) et l'Allemagne (- 17 %) ont accusé une baisse au cours de la même période. Le Japon, encore en train de se remettre de la crise économique qui a persisté pendant presque toute la dernière décennie, continue à se situer sous les taux de 1994 (- 23 %).

- Suite à l'augmentation du nombre de visites effectuées en Ontario, les dépenses totales des visiteurs d'outre-mer ont connu une croissance de 21,8 % en dollars constants de 1992, entre 1994 et l'an 2000.

- Le total des dépenses des visiteurs d'outre-mer en Ontario, qui se chiffrait à 2 475 millions de dollars en l'an 2000, a cru de 14 % par rapport à 1999, principalement en raison d'une augmentation importante du nombre de vols des transporteurs aériens dans la province. Ces vols ont connu une augmentation de 29 % entre 1999 et l'an 2000 et représentent maintenant plus d'un tiers des dépenses totales des visiteurs d'outre-mer dans la province (35 %).

- La moyenne des dépenses par visite-personne (en dollars constants de 1992) a augmenté de 15,4 %, passant de 709 $ en 1994 à 819 $ en l'an 2000.

- Les visiteurs d'outre-mer, en l'an 2000, ressemblent en gros à ceux qui sont venus dans la province en 1999 en ce qui a trait à la longueur de leur séjour. Plus de 8 visiteurs sur 10 ont passé au moins une nuit dans la province et la moyenne des séjours s'élevait à 7,8 nuits (tous les visiteurs d'outre-mer) en l'an 2000.

- Il est plus probable maintenant que les visiteurs d'outre-mer passent au moins une nuit dans la province (86 %) que ce n'était le cas en 1994 (83 %). De plus, la longueur des séjours dans la province a connu une hausse, passant de 7,9 nuits en 1994 à 9,0 nuits en l'an 2000.

- Malgré le fait que les « divertissements » continuent d'être la raison principale qui motive les visites d'outre-mer (43 %), cette raison connaît un déclin constant depuis 1994, où elle représentait la moitié du marché d'outre-mer (51 %). Inversement, le nombre de visiteurs venus voir des amis ou de la famille a connu une croissance au cours de la même période, passant de 29 % en 1994 à 33 % en l'an 2000. Les voyages d'affaires en l'an 2000 sont demeurés environ au même niveau, pour une troisième année consécutive, et représentaient un cinquième des voyages d'outre-mer en Ontario.

- Les hôtels demeurent la forme d'hébergement la plus populaire auprès des visiteurs d'outre-mer en Ontario. La moitié des visiteurs d'outre-mer ont passé au moins une nuit dans un hôtel pendant leur séjour dans la province.

- La proportion de visiteurs d'outre-mer en Ontario venus dans le but de voir leurs amis et leur famille ayant augmenté, il est normal de constater une augmentation coïncidente de la proportion de visiteurs qui comptent sur leurs amis et leur parenté pour les héberger. Cette proportion est passée de 39 % en 1994 à 43 % en l'an 2000.

- Les visiteurs d'outre-mer qui sont restés plus de 24 heures en Ontario ont fait des activités très similaires aux visiteurs des années précédentes. En l'an 2000, ils ont, tout comme les visiteurs des années antérieures, fait du tourisme, visité un parc ou un site historique, ils sont allés visiter un musée, un zoo ou une exposition naturelle et ont dîné dans un restaurant lors de leur séjour au Canada.

- Il n'y a aucune différence entre les activités auxquelles les visiteurs d'outre-mer ont participé d'une région à l'autre de la province cette année et celles de l'année passée. La région du grand Toronto a attiré 7 haltes de visiteurs d'outre-mer sur 10 en 1999 et a attiré le même nombre en l'an 2000 (71 %). Par ailleurs, 4 visiteurs d'outre-mer sur 10 se sont arrêtés pour une nuit ou ont passé une journée dans la région des festivals de l'Ontario en 1999 et en l'an 2000, et près de 3 visiteurs sur 10 se sont arrêtés dans l'Est de l'Ontario au cours de chacune de ces deux années (27 %).

INTRODUCTION

The information contained in this report was extracted from the micro data files of the International Travel Survey (ITS) by Research Resolutions & Consulting Ltd. on behalf of the Ontario Ministry of Tourism, Culture and Recreation.

The ITS is conducted by Statistics Canada every year with the help of Canada Customs and Immigration authorities which essentially conducts a census of border crossings and distributes the questionnaires to a sample of individual travellers. The questionnaires are self-completed by the travellers and are mailed back to Statistics Canada.

The provincial statistics presented in this report are based on the census of overseas visitors as far as their numbers, their origin and their mode of transport used to enter Canada are concerned. Most of the remaining trip characteristics were obtained from 3,461 completed questionnaires by overseas visitors (out of 6,936 usable questionnaires of overseas visitors to Canada).

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

1. Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit used.

2. Ontario does a number of imputations for missing values.

3. Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. The former are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

The regional data contained in this report differ from the data contained in pre-1998 ministry-publications because same day excursions by overnight visitors to Ontario were not included in the database prior to 1998. The reader is referred to the 1999 report and tabulations for a comparison of Ontario level data with and without same-day excursions by overnight visitors.

For more details on how Ontario manages this database, please write to the address below to obtain the technical appendix.

To aid the reader, a glossary of terms used throughout this report is appended. For more information on this publication please contact:

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AN OVERVIEW OF ONTARIO'S OVERSEAS VISITORS - 2000

Ontario's Share of Overseas Visits to Canada During 2000, 4.606 million overseas residents visited Canada (excluding commuters and students) and of these, 4.356 million stayed for one or more nights. Ontario accounted for 50% of the total overseas visitors to Canada (or 2.287 million) and 45% of the overnight visitors (or 1.965 million).[1]

Of the 2.287 million overseas visitors to Ontario, 1.251 million visited only Ontario and the remainder of 1.036 million visited Ontario and some other Canadian province.[2]

Port of Entry into Canada A total of 1.935 million overseas visitors entered Canada through Ontario's international ports. The main port of entry into the country for these visitors was Toronto's international airport, accounting for 90%, followed by the ports of Niagara Falls/Fort Erie (13%) and Windsor (2%). A significant portion of the total overseas visitors to Ontario entered Canada through non-Ontario ports - namely, those of Quebec and British Columbia.[3]

Transportation Used Most overseas visitors who visited Ontario came to Canada by air (88%), although 12% of them came to Ontario via the U.S. by auto, train, bus, or boat. Of those who used air, 76% came to Canada directly from overseas and 24% flew into Canada from a location in the United States.[4]

While in Canada, overseas visitors to Ontario chose the automobile most of the time for inter-city travel (68%), followed by commercial bus (29%), plane (19%), train (11%), boat (8%) or other means (27%). Of those who used an automobile to travel within Canada, almost half (48%) rented an automobile for at least part of their stay in the country.

Same Day vs. Overnight Of the 2.287 million overseas visitors to the province, 14% (or 322,000) stayed for one day or less and 86% (or 1.965 million) stayed for one or more nights.

Origin The U.K. generated the largest share of total overseas visitation to the province (468,000 million or 21%), followed by Japan (230,000 million or 10%), Germany (177,000 million or 8%), and France (156,000 million or 7%).[5]

The U.K. also generated the largest share of overnight person visits to Ontario (21% or 420,000), followed by Japan (10% or 198,000), Germany (8% or 151,000) and France (7% or 136,000).[6]

Visitors from all European countries accounted for 52% of the total overseas visitors to Ontario, followed by visitors from east Asia (24%), other Asia (6%), the Caribbean (4%), South America (4%), Central America (4%), the Pacific (4%) and Africa (2%).[7]

Route Used to Enter Canada Most overseas visitors in Ontario came to Canada directly from their country of residence by air (67%). Direct arrival is most characteristic of European visitors (79%) and especially those from the U.K. (81%) and France (81%). In contrast, direct arrival in Canada by air is least characteristic among Asian visitors to Ontario (53%) and especially of those from Japan (45%). Asian visitors who come to Canada via the U.S. either fly (27%) or enter via a U.S. land port by auto, bus, or train (21%).[8]

About half of the overseas overnight visitors to Ontario who came via the U.S. had spent nights south of the border prior to their entry to Canada. In the majority of cases, these overnight visitors spent three or more nights in the U.S. before travelling on to Canada, suggesting that the U.S. and Canada may have been a dual-destination.[9]

Seasonality Overseas visitors continue to concentrate their visits to Ontario in the third calendar quarter (43%), followed by spring (29%), fall (17%) and winter (11%). The same seasonal pattern is evident for overnight visitors to the province.[10]

There is comparative consistency in seasonal patterns for Ontario's major overseas markets, although overnight visitors from Germany (52%) and France (51%) – markets that are predominantly "pleasure" markets -- had a higher incidence of travel in the summer months than their counterparts from the U.K. (43%) and Japan (42%). The U.K. has a particularly high level of visits to see friends and relatives and Japan generates a comparatively high level of business trips.

Consistent with these market profiles, overnight trips motivated by "pleasure" are most highly concentrated in the third calendar quarter (49%), followed by the spring quarter (31%). The fourth quarter attracts only 13% of Ontario's overseas overnight pleasure visitors.

The third calendar quarter is also very popular among tourists coming to Canada to see friends and relatives (45%), followed by the spring quarter (24%) and a comparatively robust fourth quarter. One-fifth of overseas overnight visitors in Ontario on "VFR" trips are in Canada during the fourth quarter, likely coincident with major winter holidays and religious festivals.

Overnight overseas business travel in Ontario has a somewhat different seasonal distribution than does pleasure or VFR travel. About one-third of trips motivated by business commence in each of the spring (36%) and summer quarters (33%), with the remaining one-third divided evenly between the fall quarter (16%) and the winter quarter (16%).[11]

Main Purpose of Trip More overseas residents who visited Ontario during 2000 were on pleasure trips (43%) than travelled for any other single reason. Visitors who took their trips for the purpose of visiting friends or relatives accounted for 33% of Ontario's overseas visitors, while business travellers accounted for 20%. The same trip purpose pattern is evident among overseas overnight visitors to Ontario in 2000.[12]

Japan was the largest source of overnight business visits to Ontario, while the U.K. was the largest source of overnight VFR and pleasure visits to Ontario.

The pleasure market for Ontario is the most highly concentrated among comparatively few countries. The four major sources of overnight visitors from overseas in 2000 – U.K., Japan, Germany and France -- account for over half of all pleasure travel to the province from abroad (55%). In contrast, the four leaders in the business (42%) and VFR (45%) markets account for less than half of their respective flows suggesting a more diversified mix of feeder countries (see Chart 1).

CHART 1: The Top Overnight Overseas Travel Markets by Main Purpose and Origin					
Pleasure (total=838,000 visits)		**Business (total=390,000 visits)**		**VFR (total=661,000 visits)**	
% of Overnight Overseas Pleasure Visits from:		**% of Overnight Overseas Business Visits from:**		**% of Overnight Overseas VFR Visits from:**	
U.K.	22%	Japan	18%	U.K.	27%
Japan	13%	U.K.	12%	Germany	6%
Germany	11%	South Korea	6%	France	6%
France	9%	Germany	6%	Hong Kong	6%
Australia	4%	Mexico	5%	Australia	3%
Mexico	3%	Italy	5%	Mexico	3%
Special ITS Overseas Tabulations, MTCR, page P2-1.					

Length of Stay in Ontario On average, overseas visitors stayed in the province for 7.8 nights, and those who spent at least one night in Ontario stayed for an average of 9.0 nights in the province.

Japanese and French overnight visitors had the lowest average length of stay in Ontario (3.7 nights and 6.0 nights, respectively). In the case of the Japanese visitors, the relatively brief visit in Ontario is likely related to the brevity of the entire trip to Canada – Japanese visitors who spend an average of 3.7 nights in Ontario are spending only 6.2 nights in Canada as a whole.

Among those who spend any night in the province, visitors from the U.K. and other European countries excluding Germany and France are especially likely to concentrate the time they spend in Canada within Ontario (85% and 86%, respectively). Visitors from France who spend nights in Ontario spend a higher share of their nights in other parts of Canada than they spend in Ontario (43%) and those from Japan also spend a sizeable portion of their trip elsewhere in Canada. Ontario attracts only 60% of the nights spent on these Japanese visitors' comparatively short trips.

Overnight overseas visitors in Ontario on a trip to see friends or relatives averaged close to two full weeks within the province (13.0 nights) whereas trips made for pleasure averaged just over one week within Ontario (7.6 nights). Business trips kept the overseas overnight visitor in Ontario for just over five nights (5.3 nights).[13]

Chart 2: Share of Nights in Ontario by Overnight Overseas Visitors

Average number of nights . . .	Total	U.K.	Germany	France	Other Europe	Japan	Other Asia	All Other
In Canada	11.8	10.9	12.5	13.9	13.0	6.2	12.7	12.6
In Ontario	9.0	9.3	9.8	6.0	11.1	3.7	9.7	9.9
Share of Total Nights Spent in Ontario	77%	85%	78%	43%	86%	60%	76%	79%

Source: Special ITS Overseas Tabulations, MTCR, page P35; P37-1

On a seasonal basis, lengths of stay by overnight overseas visitors in the province are shorter in the winter (Jan-Mar, 7.4 nights) than in any other quarter but there are not substantive differences in the length of stay in the remaining three quarters. On average, overnight overseas visitors stay in the province for close to nine nights in the second (9.9 nights), third (8.9 nights) and fourth quarters (9.0).

Party Size Travelling parties from overseas countries on a same day visit to Ontario had an average size of 1.7 persons, while those on an overnight visit had an average size of 1.8 persons. Business travellers are more apt to be travelling "solo" than are those travelling for other purposes. This reality is reflected in the smaller party size for overnight business travellers in the province (1.4 persons) than is evident for those on overnight pleasure trips (2.2 persons) or trips to see friends and relatives (1.7 persons).[14]

Party Composition The vast majority of overseas visitors to Ontario (91%) travelled in parties comprised of adults only. The remainder (8%) travelled in parties with adults and at least one child less than 15 years old. Of the parties comprised of adults only, close to half were one-adult parties, one-third were two-adult parties and one-tenth were in parties of three or more adults.[15]

Age and Gender The average overseas visitor to Ontario was 42 years old and was slightly more likely to be a male (51%) than a female (49%).[16]

The average overnight overseas visitor was also 42 years old. Within the overnight visitor segment, equal proportions of visitors are men and women.

Looking at the ends of the age spectrum, fewer than one-tenth of overseas visitors to Ontario were under the age of 15 (8%) while 1-in-10 were over the age of 64 (10%). Of Ontario's four major overseas overnight feeder markets, the French are the youngest, with an average age of 39 years and those from the U.K. are the oldest, with an average age of 46 years. German and Japanese overnight visitors to Ontario fall between these two groups.

Because of the prevalence of business travel among Japanese overnight visitors to Ontario, it is not surprising to find that more of these travellers are men (62%) than is the case for the other major overnight overseas feeder markets in the province (U.K., 47% men; France 50% men; Germany 50% men).

Accommodation Most of the 17.7 million person nights in the province by overseas visitors were spent in non-commercial accommodation (56% or 9.9 million person nights in private homes or private cottages). A further 4.7 million person nights were spent in roofed

commercial accommodation by overseas visitors in Ontario in 2000. Most of these nights were spent in hotels in the province (3.6 million person nights). A further 664,000 person nights were spent in motels, 485,000 in commercial cottages or cabins, and 360,000 were spent in campgrounds or trailer parks by overseas visitors.[17]

CHART 3: Overnight Person Visits from Overseas Countries by Accommodation Type

Type of Accommodation	Share of Overseas Person Nights in Ontario	Average Length of Stay in Ontario (nights)	Average Party Size (persons)	Proportion of "Adults-Only" Parties
Hotel	20%	3.7	1.9	92%
Motel	4%	3.0	2.2	89%
Commercial Cottage	3%	6.0	2.3	84%
Camping/Trailer Park	2%	6.2	2.3	75%
Home of Friend/Relative	55%	11.8	1.8	89%
Private Cottage	*	5.2	2.0	69%

Source: Special ITS Overseas Tabulations, MTCR, P16-1, M38-1, M39-1 *Less than 0.5%. The balance of nights are described as "other" accommodation type or not specified by the respondent.

Among Ontario's four main overseas markets, the U.K. had the lowest incidence of commercial accommodation usage: 28% of the person nights generated by U.K. visitors were spent in commercial roofed accommodation. This low level of commercial accommodation usage is likely a function of the high proportion of U.K. visitors in the province who visit . . . and stay with . . . their friends and relatives.

In contrast, visitors from Japan had the highest level of commercial roofed accommodation use (59%), reflecting the prominence of the pleasure and business segments within the Japanese market.

Visitors who used the homes of friends or relatives as accommodation stayed the longest in Ontario and travelled in groups of the smallest party size.

Activities Irrespective of the country of origin, the overwhelming majority of the overnight overseas visitors who came to Ontario during 2000 went shopping (82%) and /or sightseeing (78%) while on their Canadian trip. Visiting friends or relatives was the third most popular activity (61%), followed by visits to parks or historic sites (50%). Outdoor sports and activities form part of the Canadian experience for about 1-in-4 Ontario overnight overseas visitors (23%).

These activity participation levels are as evident for all overnight overseas visitors in Ontario as they are for those who restricted their Canadian trip to Ontario locations only. As shown in the accompanying chart, however, there are some shifts in the relative positions of the top three activities for different overseas travel flows (origin) and for the subset of travellers on pleasure trips.

CHART 4: Activities Participated in During the Trip - Overnight Visitors from Overseas Countries

Origin	All Main Purposes		Main Purpose Pleasure	
U.K.	Shopping	92%	Shopping	96%
	Sightseeing	87%	Sightseeing	95%
	Visit friends/relatives	70%	Visit Park/historic site	64%
France	Shopping	83%	Shopping	89%
	Sightseeing	79%	Sightseeing	89%
	Zoo/museum/display	65%	Zoo/museum/display	74%
Germany	Sightseeing	85%	Sightseeing	94%
	Shopping	79%	Shopping	79%
	Visit Park/Historic site	63%	Visit Park/Historic site	76%
Other Europe	Shopping	82%	Shopping	87%
	Sightseeing	75%	Sightseeing	83%
	Visit friends/relatives	63%	Visit Park/Historic site	64%
Japan	Sightseeing	78%	Sightseeing	91%
	Shopping	66%	Shopping	69%
	Visit Park/Historic site	41%	Visit Park/Historic site	55%
Other Asia	Shopping	78%	Shopping	76%
	Sightseeing	75%	Sightseeing	87%
	Visit friends/relatives	70%	Visit friends/relatives	61%
All Other Countries	Shopping	86%	Shopping	85%
	Sightseeing	68%	Sightseeing	79%
	Visit friends/relatives	63%	Visit Park/Historic site	67%

Source: Special ITS Overseas Tabulations, MTCR, P24; M1S/16-1.

Rating of Services Visitors were asked to rate various aspects of their trip experience in Canada relative to their home countries. There is no single pattern in overseas overnight Ontario visitors' responses. Nonetheless, most visitors rate the transportation, accommodation, hospitality of local people, and the variety of things to see and do as better than or the same as what might be found in their home country. With the exceptions of visitors from the U.K. and Japan, however, neutral or negative ratings of Canada for *value for money* are characteristic of the majority of overseas visitors. For example, over 4-in-10 German overnight visitors to Ontario claim that value for money is worse in Canada, over 1-in-3 from "other Europe" countries make this claim, as do 1-in-4 visitors to Ontario from Asian countries other than Japan.

CHART 5: Rating of Services in Canada Compared to Home Country
Overnight Person Visits from Overseas Countries

Origin of Visitors	Transport Services	Accom. Services	Hospitality of Local People	Value for Money	Variety of Things to See & Do
U.K.					
Better	46%	43%	62%	75%	37%
Same	38%	56%	36%	23%	50%
Worse	16%	1%	2%	2%	13%
France					
Better	17%	31%	80%	28%	23%
Same	60%	60%	19%	46%	56%
Worse	23%	10%	1%	27%	21%
Germany					
Better	9%	23%	66%	20%	39%
Same	61%	69%	31%	37%	53%
Worse	30%	7%	3%	43%	9%
Other Europe					
Better	38%	34%	44%	33%	35%
Same	43%	61%	52%	32%	50%
Worse	19%	6%	4%	35%	16%
Japan					
Better	23%	33%	50%	64%	44%
Same	46%	57%	48%	27%	42%
Worse	31%	10%	3%	10%	14%
Other Asia					
Better	60%	52%	51%	45%	62%
Same	25%	42%	41%	31%	28%
Worse	15%	6%	8%	25%	10%
Other Countries					
Better	70%	39%	28%	39%	58%
Same	25%	57%	58%	33%	34%
Worse	5%	5%	14%	28%	8%

Source: Special ITS Overseas Tabulations, MTCR, PS6-1/3

"Better", "same" and "worse" [*not as good*] are consumers' ratings of their trip in Canada "*in comparison with your home country*".

Regional Visitation The vast majority of the same day person-visits from overseas countries to Ontario accrued to Metro Toronto (64% or 207,000) and to Festival Country (19% or 60,000). In addition, Metro Toronto received 103,000 same day excursions of overseas visitors who were in Ontario on an overnight trip and Festival Country received 215,000 of these excursions.[18]

Metro Toronto (67% or 1,320,000 visits), Festival Country (32% or 630,000 visits) and Ontario East (27% or 528,000 visits) were the most popular regions for overnight travel. Chart 6 shows the top overnight travel markets for each of Ontario's six southern travel regions and for the six northern regions as a combined unit (unduplicated visits to Ontario's

north). Information on each of the six northern regions is contained in the detailed tabulations.[19]

U.K. was the most important overseas market for all of the regions, with the exception of Ontario North where Germany accounted for more overseas overnight travel in the region than did any other country.

CHART 6: The Top Overnight Markets for each of Ontario's Travel Regions
Total Overnight Person Visits from Overseas Countries

Region Visited	% of Overnight Overseas Visits to Regions from Countries with at least 5% Share	
1: Southwestern Ontario	U.K.	27%
(total overnight overseas visits=107,000)	Netherlands	11%
	Germany	7%
	Hong Kong	5%
2: Festival Country	U.K.	26%
(total overnight overseas visits=630,000)	Japan	11%
	France	10%
	Germany	9%
3: Lakelands	U.K.	35%
(total overnight overseas visits=139,000)	Germany	19%
	Netherlands	5%
	Taiwan	5%
4: Metro Toronto	U.K.	20%
(total overnight overseas visits=1,320,000)	Japan	9%
	Germany	8%
	France	7%
5: Getaway Country	U.K.	27%
(total overnight overseas visits=133,000)	Germany	13%
	Hong Kong	6%
	Taiwan	6%
6: Ontario East	U.K.	21%
(total overnight overseas visits=528,000)	France	14%
	Germany	10%
	Japan	6%
	Mexico	5%
Regions 7-12: Northern Ontario	Germany	24%
(total overnight overseas visits=95,000)	U.K.	18%
	Netherlands	10%
	Japan	8%

Source: Special ITS Overseas Tabulations, MTCR, 84-1/2

CHART 7: Total Person Visits in Ontario from Overseas Countries by Average Length of Stay and Party Size				
	Average			
	Length of Stay		Party Size	
Region Visited	All Visits	Overnight Visits	All Visits	Overnight Visits
	(Nights)		(Persons)	
1: Southwestern Ontario	6.5	8.0	1.7	1.8
2: Festival Country	3.5	5.0	2.0	2.1
3: Lakelands	4.5	5.6	2.0	2.1
4: Metro Toronto	5.2	6.4	1.8	1.8
5: Getaway Country	6.9	8.0	1.9	1.9
6: Ontario East	4.6	5.3	1.9	1.9
Regions 7-12: Northern Ontario	5.1	6.3	1.9	1.9
Source: Special ITS Overseas Tabulations, MTCR, R14-1, R24-2				

Overseas visitors in Southwestern Ontario and Getaway Country tended to spend more nights in these regions than did those who visited other parts of the province. On average, an overnight overseas visitor in Southwestern or Getaway Country spent eight nights in the region whereas those who went to Festival Country, Lakelands or Ontario East spent closer to five nights in the region. Overseas overnight visitors to Metro Toronto and the northern portion of the province spent about six nights in these regions, on average, in 2000.

Party size for overseas visitors is relatively stable from one region to the next, although Festival Country and Lakelands attract overnight overseas visitors who have slightly larger party sizes than do other regions.

Trips by overseas overnight visitors to most of Ontario's travel regions tend to be motivated by pleasure, followed by visiting friends and relatives (VFR). Only Southwestern Ontario attracts more overseas visitors who are travelling to see friends and relatives (58%) than on a pleasure trip (23%). Business travel is especially common among overseas overnight visitors in tourism regions with major urban centres such as Metro Toronto (21%) and Ontario East with the nation's capital (17%).

CHART 8: Total Person Visits in Ontario from Overseas Countries

Region Visited	% of Visits to a Region by Main Purpose of Trip	All Visits	Overnight Visits
1: Southwestern Ontario	Pleasure	22%	23%
	VFR	58%	58%
	Business	15%	14%
	Personal/Other	5%	6%
2: Festival Country	Pleasure	54%	53%
	VFR	31%	33%
	Business	11%	10%
	Personal/Other	4%	4%
3: Lakelands	Pleasure	48%	47%
	VFR	43%	44%
	Business	7%	6%
	Personal/Other	3%	3%
4: Metro Toronto	Pleasure	44%	46%
	VFR	32%	30%
	Business	20%	21%
	Personal/Other	4%	4%
5: Getaway Country	Pleasure	49%	50%
	VFR	42%	43%
	Business	6%	6%
	Personal/Other	3%	2%
6: Ontario East	Pleasure	48%	48%
	VFR	32%	31%
	Business	17%	17%
	Personal/Other	4%	4%
Regions 7-12: Northern Ontario	Pleasure	52%	48%
	VFR	38%	41%
	Business	8%	8%
	Personal/Other	2%	2%

Source: Special ITS Overseas Tabulations, MTCR, P41-1; P42-1, horizontal %s.

Expenditures Overseas visitors spent a total of $1,603 million in the province and an additional $872 million on Canadian carrier fares in order to get here, for a total of $2.475 million of overseas residents' spending in 2000. Of this total, $1,516 million was spent by overseas travellers for whom Ontario was the only Canadian province visited on their trip. Ontario represents over one-third of all spending by overseas visitors in Canada ($2.475 million out of $7.068 million).[20]

Put within the context of Ontario's balance of payments on the Tourism Account, in 2000 Ontarians spent $3,911 million in overseas countries, which when combined with the $2,475 million in receipts yields a deficit of $1,436 million with the overseas countries. In other words, Ontarians spent $1,436 million more in overseas countries than the residents of those countries spent in Ontario (fares are included).

Overseas visitors on a same day visit to Ontario spent a total of $152 million, whereas those who stayed in Ontario for one or more nights spent $2,323 million, or $1,182 per person visit. The overall average (any length of stay) was $1,082 per person visit.

CHART 9: Total Overseas Visitors' Expenditures Assigned to Ontario

Country of Origin	Total Expenditures (millions)	Average Spending* Per Person Visit	
		All Visits	Overnight Visits
U.K.	$580	$1,238	$1,305
France	$112	$716	$767
Germany	$187	$1,052	$1,175
Other Europe	$379	$957	$1,043
Japan	$231	$1,002	$1,125
Other Asia	$512	$1,087	$1,214
Other Countries	$475	$1,226	$1,332
Total Overseas	$2,475	$1,082	$1,182

Source: Special ITS Overseas Tabulations, MTCR, P4-1; P31; P32-1. *Average spending per person visit in Ontario including domestic carrier fares.

The overall average expenditure per person visit ranged from a low of $716 for French visitors to a high of $1,238 for those from the U.K. These estimates include the cost of getting to Canada from overseas for visitors who relied on a Canadian domestic carrier for their trans-continental travel.[21]

A different spending pattern emerges when carrier fares to reach Canada are excluded. In this scenario, reflecting spending on core tourism services such as accommodation, food/beverages, entertainment and local/inter-regional transportation within Canada, visitors in Ontario from Germany, Asia excluding Japan and countries outside Europe and Asia are the biggest spenders on a per person basis, (see Chart 10).

CHART 10: Total Overseas Visitors' Expenditures Assigned to Ontario (Excludes Public Transport Fares to and from Canada/Ontario)			
Country of Origin	**Total Expenditures (millions)**	**Average Spending* Per Person Visit: All Visits**	**Overnight Visits**
U.K.	$334	$714	$790
France	$81	$519	$589
Germany	$134	$754	$879
Other Europe	$241	$610	$726
Japan	$130	$565	$642
Other Asia	$358	$758	$886
Other Countries	$325	$839	$970
Total Overseas	$1,603	$701	$807

Source: Special ITS Overseas Tabulations, MTCR, P4-1; P31; P32-1. *Average spending per person visit in Ontario excluding domestic carrier fares.

Those travelling primarily to see friends and relatives spent less money in Ontario ($499 million) than did overseas visitors travelling primarily for pleasure ($611 million). In both cases, spending is roughly commensurate with the travel volume represented by the main purpose.[22] A different pattern is evident for business travel. This market represents only 20% of all overseas tourism in Ontario in 2000, but generates 27% of overseas spending in the province ($429 million). The importance of business travel is evident in the higher yield per trip generated by this type of travel. Each overseas business traveller spends approximately $1,000 in Ontario compared to between $625 and $650 on average, for pleasure or VFR overseas visitors (figures are rounded – see Chart 11).

In light of the fact that over two-fifths of all overseas travel in Ontario takes place in the third calendar quarter (43%), it is not surprising that spending is also highly concentrated in this season ($693 million or 43%). Average spending by overseas visitors in the first quarter (Jan – Mar) is marginally lower – at about $600 per person visit – than is the case for the other quarters. At the same time, there is remarkable consistency in overseas visitors' average spending in the second, third and fourth quarters -- at about $700 per person visit.

Overseas visitors in Ontario exhibit somewhat different spending patterns depending on whether they spend their nights in the province's paid, roofed lodging or in private homes or campgrounds. For example, overnight overseas business travellers spend their nights in hotels in the province – 71% of them only use hotels in Ontario.[23] In turn, these business travellers spend almost half of their total spending in the province on accommodation (47%).

In contrast, overseas overnight pleasure travellers are likely to divide their accommodation in the province between roofed commercial lodgings (55%) and non-commercial or camping facilities (45%). These pleasure travellers spend about one-quarter of their total spending on lodging in Ontario (28%). Many overseas visitors who are travelling to see friends and relatives also *stay with* friends or relatives rather than utilizing paid lodging facilities in the province. As a consequence, these travellers spend comparatively little on accommodation in Ontario (12%).

CHART 11: Overseas Visitors' Expenditures Assigned to Ontario by Trip Purpose & Season (Excludes Public Transport Fares to and from Canada/Ontario)			
Trip Purpose	**Total Expenditures (millions)**	**Average Spending* Per Person Visit: All Visits**	**Overnight Visits**
Pleasure	$611	$623	$720
VFR	$499	$658	$749
Business	$429	$948	$1,087
Season			
Quarter I	$147	$607	$724
Quarter II	$492	$732	$843
Quarter III	$693	$707	$796
Quarter IV	$272	$692	$824

Source: Special ITS Overseas Tabulations, MTCR, P4-1; P31; P32-1. *Average spending per person visit in Ontario excluding domestic carrier fares.

CHART 12: Distribution of Total Overseas Expenditures in Ontario by Item of Expenditure (Excludes Public Transport Fares to and from Canada/Ontario)						
	Pleasure		**VFR**		**Business**	
Item of Expenditure	**All Visits**	**Overnight Visits**	**All Visits**	**Overnight Visits**	**All Visits**	**Overnight Visits**
Accommodation	28%	28%	11%	12%	46%	47%
Auto/Local Transport	16%	16%	14%	14%	12%	12%
Food & Beverage	21%	21%	23%	23%	17%	17%
Entertainment	12%	11%	15%	15%	6%	6%
Retail/Other	24%	23%	36%	36%	19%	19%

Source: Special ITS Overseas Tabulations, MTCR, page P14-1.

Metro Toronto not only received the largest share of overseas expenditures in Ontario (67%), but its visitors also had the highest average spending per person visit of Ontario's travel regions. This region attracts a disproportionately high number of business travellers. It is also the "reception" point for many overseas travellers because it has Canada's largest international airport. Substantive airfares accrue to the region because many overseas travellers use Toronto as their point of entry/exit. These factors likely explain the high volume and average spending in this region.

CHART 13: Total Overseas Expenditures Assigned to Ontario's Regions

Region	Total Expenditures (millions)	Average Spending per Visit* All Visits	O/night Visits
1: Southwestern Ontario	$52	$390	$470
2: Festival Country	$282	$310	$418
3: Lakelands	$56	$323	$389
4: Metro Toronto	$1,666	$946	$1,032
5: Getaway Country	$74	$476	$543
6: Ontario East	$303	$500	$554
Regions 7-12: Northern Ontario	$39	$330	$403
Region Unknown	$3	N/A	N/A

Source: Special ITS Overseas Tabulations, MTCR, P43, R13

* Some regions, especially Metro Toronto, were assigned transport fares of travellers who were in transit and did not visit the region. The averages shown in this table exclude these transport fares.

COMPARISON OF KEY FINDINGS
OVERSEAS MARKET: 1994 through 2000

Total visitation to Ontario from overseas countries increased between 1999 and 2000 by 7%. The 2.287 million overseas visitors in the province in 2000 represent a five percent increase over 1994 (2.168 million). With the exception of the U.K., most of the growth in Ontario's overseas markets between 1994 and 2000 came from non-traditional markets such as Australia (+33%), Mexico (+60%), Hong Kong and South Korea (+26% each).

The U.K. experienced growth between 1994 to 2000 (+21%) but other major European markets such as France (-28%) and Germany (-17%) have declined over this period. Japan, still recovering from the financial crisis that has persisted over much of the past decade, continues to perform below 1994 levels (-23%).

CHART 14: Total Person Visits to Ontario from Overseas Countries by Origin

Origin of Visitors	1994		1996		1998		1999		2000	
	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)
U.K.	387	18	424	17	428	20	419	20	468	21
Japan	297	14	332	13	245	11	247	12	230	10
France	218	10	214	8	194	9	188	9	156	7
Germany	213	10	245	10	175	8	155	7	177	8
Italy	76	4	84	3	77	4	73	3	75	3
South Korea	69	3	123	5	41	2	62	3	87	4
Hong Kong	62	3	110	4	67	3	72	3	78	3
Netherlands	56	3	72	3	51	2	60	3	54	2
Australia	52	2	75	3	66	3	54	3	69	3
Mexico	52	2	45	2	59	3	62	3	83	4
Israel	52	2	65	3	49	2	44	2	61	3
Other countries	634	29	768	30	706	33	711	33	749	33
Total overseas	2,168	100	2,557	100	2,158	100	2,144	100	2287	100

Source: Special ITS Overseas Tabulations, MTCR, P1-2

Overnight visitors from overseas markets increased by 5% between 1999 and 2000, primarily as a result of increased overnight visitation from residents of non-traditional markets such as South Korea, Australia, Mexico and Israel. The U.K. continued on its growth trajectory, up 10% over 1999, primarily as a result of favourable currency values vis à vis the Canadian dollar. Germany, while not at its 1994 levels, has shown a modest increase between 1999 and 2000 (+12%), but other major overnight markets for Ontario such as France (-13%) and Japan (-9%) continue to decline.

CHART 15: Total Overnight Person Visits to Ontario from Overseas Countries by Origin

Origin of Visitors	1994		1996		1998		1999		2000	
	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)
U.K.	331	19	379	18	388	21	382	20	420	21
Japan	234	13	270	13	208	11	218	12	198	10
France	185	10	183	8	166	9	157	8	136	7
Germany	173	10	208	10	152	8	135	7	151	8
Italy	62	4	65	3	61	3	63	3	54	3
South Korea	56	3	104	5	62	3	52	3	73	4
Hong Kong	52	3	63	3	49	3	66	4	71	4
Netherlands	47	3	91	4	34	2	57	3	48	2
Australia	45	3	67	3	58	3	49	3	63	3
Mexico	41	2	40	2	52	3	56	3	72	4
Israel	36	2	41	2	32	2	30	2	40	2
Other countries	527	30	657	30	604	32	612	33	639	33
Total overseas	1,789	100	2,168	100	1,866	100	1,875	100	1,965	100

Source: Special ITS Overseas Tabulations, MTCR, P2-2

Overseas visitors in 2000 closely resemble those who came to the province in 1999 with respect to their length of stay in the province. Over 8-in-10 continue to spend at least one night in the province, with an average length of stay of 7.8 nights (all overseas visitors) in 2000.

The current inbound overseas market is somewhat more likely to spend nights in the province now (86%) than was the case in 1994 (83%). Furthermore, the length of stay in the province by overnight overseas visitors has been increasing incrementally, from 7.9 nights in 1994 to 9.0 nights in 2000.

CHART 16: Duration of Overseas Person Visits in Ontario

Length of Stay in Ontario	1994		1996		1998		1999		2000	
	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)
Same Day	379	17	389	15	292	13	269	12	322	14
Overnight	1,789	83	2,168	85	1,866	87	1,875	88	1,965	86
Total	2,168	100	2,557	100	2,158	100	2,144	100	2,287	100
Average Length of Stay in Ontario (in nights):										
All Visitors	6.5	-	7.0	-	7.3	-	7.6	-	7.8	-
Overnight Visitors	7.9	-	8.3	-	8.4	-	8.7	-	9.0	-

Source: Special ITS Overseas Tabulations, MTCR, S1-1, P-35

While "pleasure" continues to be the dominant trip purpose among overseas visitors (43%), this motivation has been declining steadily since 1994 when it represented half of the overseas market (51%). Conversely, trips to see friends and relatives have been increasing over the same time period – from 29% in 1994 to 33% in 2000. Business travel in 2000 is at about the same level that it has been over the past couple of years, currently accounting for one-fifth of overseas travel in Ontario.

The same trends – a steady decline in pleasure travel and a corresponding increase in VFR travel – are evident for overnight overseas tourism in Ontario.

CHART 17: Total Person Visits in Ontario from Overseas Countries

Main Purpose of Trip	1994		1996		1998		1999		2000	
	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)
Pleasure	1,102	51	1,340	52	995	46	966	45	981	43
Business	378	17	411	16	415	19	431	20	452	20
VFR	617	29	728	29	650	30	647	30	758	33
Personal/ other	69	3	73	3	94	4	97	5	92	4
Total	2,168	100	2,557	100	2,158	100	2144	100	2,287	100

Source: Special ITS Overseas Tabulations, MTCR, P-7

CHART 18: Total Overnight Person Visits in Ontario from Overseas Countries

Main Purpose of Trip	1994		1996		1998		1999		2000	
	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)
Pleasure	875	49	1,114	51	850	46	835	45	838	43
Business	330	18	360	17	360	19	385	21	390	20
VFR	531	30	633	29	580	31	586	31	661	34
Personal/ other	51	3	57	3	72	4	67	4	72	4
Total	1,789	100	2,168	100	1,866	100	1,875	100	1,965	100

Source: Special ITS Overseas Tabulations, MTCR, P-8

Hotels remain the most popular form of lodging among overseas visitors in Ontario. Half of these overnight visitors spend at least one night in a hotel during their stay in the province.

As noted above, the proportion of overseas visitors in Ontario on trips to visit friends and relatives has been increasing. Similarly, there is a coincident increase in the proportion of overseas visitors who rely on friends and relatives for accommodation over this time period – from 39% in 1994 to 43% in 2000.

CHART 19: Type of Accommodation Used in Ontario by Overseas Visitors Percent of Overnight Person Visits by Accommodation Type Used in Ontario					
Type Of Accommodation Used	**1994**	**1996**	**1998**	**1999**	**2000**
Hotel	50%	50%	50%	50%	50%
Motel	17%	15%	14%	12%	11%
Camping/Trailer Park	3%	3%	3%	3%	3%
Commercial Cottage	3%	3%	3%	5%	4%
Commercial Unspecified	4%	4%	4%	5%	4%
Any Commercial	69%	67%	67%	67%	66%
Home of Friends or Relatives	39%	39%	39%	40%	43%
Private Cottage	*	1%	*	1%	*
Non-Commercial Unspecified	3%	3%	4%	3%	4%
Any Non-commercial	41%	42%	42%	43%	45%
Other/unknown	9%	9%	11%	9%	9%

Source: Special ITS Overseas Tabulations, MTCR, M-14. *Less than 0.5%.

Ontario's overseas overnight visitors have maintained a very consistent activity pattern over the years. In 2000, they are as likely to engage in shopping, sightseeing, visit a park or historic site, go to a museum, zoo or natural display, and/or dine in a restaurant while travelling in Canada as they were in previous years.

Similarly, overseas travellers on overnight pleasure trips have an activity profile in 2000 that is the same as they have had over the past six years.

CHART 20: Activities Participated in During the Trip
Total Overnight Person Visits in Ontario from Overseas Countries*

Activity on Trip	1994		1996		1998		1999		2000	
	All O/night Visits	O/night Pleasure	All O/night Visits	O/night Pleasure	All O/night Visits	O/night Pleasure	All O/night Visits	O/night Pleasure	All O/night Visits	O/night Pleasure
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
Shopping	80	80	81	82	83	84	82	83	83	84
Sightseeing	81	91	80	91	79	91	78	90	80	88
Dining at high quality restaurants	43	42	42	41	46	44	45	39	43	41
Visit park or historic site	51	62	50	62	51	64	50	63	50	63
Outdoors or sports	23	24	22	23	24	26	26	29	23	25
X-country skiing	*	*	1	1	1	*	1	1	1	1
Downhill	1	1	1	1	1	2	2	2	2	1
Hunting/fishing	2	3	2	3	2	3	3	4	3	2
Water-based	19	22	16	17	19	20	19	22	15	17
Visit zoo, museum, or natural display	42	50	41	50	42	51	38	46	40	49
Visit theme park	21	20	20	21	23	24	17	20	17	22
Attend festivals/fairs	18	21	17	20	18	22	13	12	14	15
Attend sports event	13	13	12	11	12	11	10	10	9	8
Attend cultural event	11	8	11	10	10	10	17	14	17	15
Nightlife/ entertainment	15	12	15	13	18	15	23	23	20	20
Visiting friends or relatives	55	40	56	41	59	43	58	45	61	47
Other	3	3	3	3	4	5	5	5	4	5

Source: Special ITS Overseas Tabulations, MTCR, P24. *Less than 0.5%. Columns add to more than 100% because visitors may have participated in more than one activity on their trip.

There are no differences in the region-to-region pattern of overseas travel within the province over the past year. Metro Toronto attracted 7-in-10 overseas visitors' stops in 1999 and continues to attract this level in 2000 (71%). Similarly, 4-in-10 overseas visitors stopped for a night or took a day excursion to Festival Country in 1999 and in 2000. Close to 3-in-10 overseas visitors stopped in Ontario East in each of these years (27%).

CHART 21: Total Person Visits in Ontario from Overseas Countries

	1994		1996		1998		1999(A)		1999(B)		2000	
Region Visited	'000s	%	'000s	%	'000s	%	'000s	%	'000s	%	'000s	%
1: Southwestern Ontario	125	6	128	5	95	4	105	5	118	6	132	6
2: Festival Country	832	38	910	36	676	31	682	32	896	42	905	40
3: Lakelands	114	5	119	5	126	6	114	5	169	8	172	8
4: Metro Toronto	1,303	60	1,596	62	1,429	66	1,417	66	1,507	70	1,630	71
5: Getaway Country	111	5	127	5	119	6	138	6	160	8	155	7
6: Ontario East	492	23	580	23	555	26	534	25	568	27	605	27
Regions 7-12: Northern Ontario	107	5	154	6	104	5	105	5	112	5	118	5
Region Unknown	8	*	13	1	8	*	6	*	6	*	5	*

Source: Special ITS Overseas Tabulations, MTCR, PHL. *Less than 0.5%. Regions do not add to the provincial total because visitors may have visited more than one region during their stay in Ontario. 1999A = without same day excursions taken by overnight visitors; 1999B = with same day excursions taken by overnight visitors. NOTE: 1999A is directly comparable to previous years; 1999B is directly comparable to 2000 and beyond.

All tourism regions in the province retained their 1999 level of visitation or saw a marginal increase in volumes between 1999 and 2000. As a result, there are no substantive changes in the relative positions of the regions. The pattern of visiting within the province in 2000 among overseas travellers on *all* overnight trips and those motivated by *pleasure* is essentially the same as it was in 1999.

CHART 22: Overnight Person Visits in Ontario from Overseas Countries

Region Visited	1994		1996		1998		1999		2000	
	'000's	Share	'000's	Share	'000's	Share	'000's	Share	'000's	Share
1: Southwestern Ontario	98	6	101	5	82	4	96	5	107	5
2: Festival Country	657	37	746	34	592	32	618	33	630	32
3: Lakelands	114	6	118	5	126	7	144	8	139	7
4: Metro Toronto	1,152	64	1,440	66	1,270	68	1257	67	1,320	67
5: Getaway Country	111	6	127	6	119	6	138	7	133	7
6: Ontario East	478	27	553	26	527	28	503	27	528	27
Regions 7-12: Northern Ontario	98	6	139	6	97	5	99	5	95	5
Region Unknown	3	*	8	*	6	*	3	*	3	*

Source: Special ITS Overseas Tabulations, MTCR, P42. *Less than 0.5%. Regions do not add to the provincial total because visitors may have visited more than one region during their stay in Ontario.

CHART 23: Overnight Person Visits in Ontario from Overseas Countries Main Purpose Pleasure

Region Visited	1994		1996		1998		1999		2000	
	'000's	Share	'000's	Share	'000's	Share	'000's	Share	'000's	Share
1: Southwestern Ontario	32	4	27	2	29	3	34	4	25	3
2: Festival Country	418	48	491	44	349	41	340	41	334	40
3: Lakelands	53	6	65	6	72	9	71	9	66	8
4: Metro Toronto	560	64	771	69	605	71	609	73	604	72
5: Getaway Country	42	5	49	4	44	5	58	7	66	8
6: Ontario East	262	30	316	28	280	33	242	29	253	30
Regions 7-12: Northern Ontario	57	7	84	8	62	7	52	6	46	5
Region Unknown	2	*	4	*	1	*	1	*	1	*

Source: Special ITS Overseas Tabulations, MTCR, P42. *Less than 0.5%. Regions do not add to the provincial total because visitors may have visited more than one region during their stay in Ontario.

At $2,475 million, total spending by overseas visitors in Ontario in 2000 increased by 14% over 1999, primarily as a result of substantial increases in air carrier accruals to the province. These fares increased by 29% between 1999 and 2000. They now represent over one-third of all spending by overseas visitors in the province (35%), compared to less than one-third (31%) in 1999.

When inflationary impacts are removed, real expenditures in Ontario by overseas visitors (measured in 1992 dollars) increased by 21.8% from $1,537.7 million in 1994 to $1,872.4 million in 2000.

Average expenditures, in constant 1992 dollars, increased by 15.4% from $709 per person visit in 1994 to $819 in 2000.

As a result of the increased share of spending on commercial domestic carriers to enter and leave Canada and an increase in the proportion overseas visits in the province that rely on private accommodation, there has been a modest decline in the proportion of tourism spending on lodging in Ontario, from 20% in 1999 to 18% in 2000.

Compared to 1994, Metro Toronto (#4) and Getaway Country (#5) experienced the only increases in their shares of total overseas spending in Ontario in 2000. All other regions experienced declines in their relative shares over this six year period, with the most substantive declines evident for Southwestern Ontario and Lakelands (-20% each).

CHART 24: Total Overseas Expenditures in Ontario

	1994		1996		1998		1999		2000	
Item of Expenditure	$ in millions	Share (%)	$ in millions	Share (%)	$ in millions	Share (%)	$ in millions	Share (%)	$ in millions	Share (%)
Accommodation	$286	18	$369	18	$364	17	$422	20	$437	18
Food & Beverage	$237	15	$303	15	$300	14	$307	14	$335	14
Canadian Carrier fares	$492	31	$576	28	$673	32	$676	31	$872	35
Public/Local Transport	$56	4	$69	3	$96	5	$95	4	$99	4
Private Transport	$97	6	$125	6	$109	5	$113	5	$131	5
Recreation/ Entertainment	$116	7	$153	8	$162	8	$167	8	$181	7
Retail/Other	$311	20	$446	22	$390	19	$389	18	$421	17
Total	$1,594	100	$2,041	100	$2,094	100	$2,169	100	$2,475	100

Source: Special ITS Overseas Tabulations, MTCR, PZR.

CHART 25: Distribution of Overseas Expenditures in Ontario by Length of Stay and Average Expenditures per Visit

	1994	1996	1998	1999	2000
Same Day	5%	4%	5%	4%	6%
Overnight	95%	96%	95%	96%	94%
Total	100%	100%	100%	100%	100%
Average Expenditures Per Person Visit:					
Same Day	$224	$222	$346	$357	$474
Overnight	$843	$902	$1,062	$1,105	$1,182
Total	$735	$798	$970	$1,012	$1,082

Source: Special ITS Overseas Tabulations, MTCR, S3, P32, R13.

CHART 26: Total Overseas Expenditures by Region

	1994		1996		1998		1999		2000		2000/94
Regions	Millions	Share	Millions	Share	Millions	Share	Millions	Share	Millions	Share	% Rate of Change in Shares
1	$40	3%	$45	2%	$39	2%	$43	2%	$52	2%	-20%
2	$198	12%	$241	12%	$243	12%	$278	13%	$282	11%	-11%
3	$40	3%	$41	2%	$43	2%	$57	3%	$56	2%	-20%
4	$1,040	65%	$1,329	65%	$1,413	68%	$1,418	65%	$1,666	67%	3%
5	$43	3%	$72	4%	$61	3%	$60	3%	$74	3%	11%
6	$194	12%	$262	13%	$251	12%	$272	13%	$303	12%	-2%
Regions 7-12	$37	2%	$47	2%	$38	2%	$38	2%	$39	2%	-13%
Region Unknown	$2	*	$4	*	$5	*	$3	*	$3	*	0%

Source: Special ITS Overseas Tabulations, MTCR, P43. *Less than 0.5%.

Glossary

ACCOMMODATION TYPE refers to the type(s) of accommodation used on the trip.

Commercial accommodation: hotel, motel, camping/trailer park and commercial cottage

Non-Commercial accommodation: home of friends or relatives, private cottage.

Other: Few categories of accommodation are available in the ITS questionnaire and no instructions are provided to guide the respondent in the use of "other" accommodation. As such, "other" could include B&Bs, resorts, dormitories, hostels, sleeping berths on trains and boats, etc.

Commercial Unspecified: This term is used when a respondent did not specify the type of accommodation used, but indicated that he/she spent money on accommodation.

Any commercial accommodation: Refers to trips on which a respondent reported utilising any form of commercial accommodation.

Any non-commercial accommodation: This term is analogous to *any commercial accommodation*, and is used for trips reporting staying with friends and relatives and/or in private cottage or vacation home.

ACTIVITIES ON TRIP. Respondents were asked to indicate whether they participated in any of the pre-specified activities. The activity could have occurred at any location on the trip since the activity data are not captured on a location-specific basis.

Since a visitor could participate in more than one activity, the activity shares add up to more than 100%.

EXPENDITURES ON TRIP. These include all dollars spent by all persons on a travelling party. These expenditures exclude transportation fares paid to non-Canadian carriers.

MODE OF TRANSPORT. The ITS records two types of transport used: a) to enter Canada and b) while in Canada. *Other* transport includes pedestrian, motorcycle and bicycle. Due to multiple responses on the mode of transport while in Canada (i.e. a respondent could have used multiple transportation modes), the numbers of the various modes used add up to more than 100%.

PERSON NIGHT. One visitor spending one night in a specified location on the trip.

PERSON VISIT. A person making one visit to a region.

PURPOSE OF TRIP (MAIN). The main reason for the trip to Canada. The details for each main group are as follows:

Pleasure: includes vacation, visiting second home, attend events/attractions and shopping.
Business: includes attending a meeting, convention, and other work.
Visiting Friends and Relatives: includes visiting friends and relatives.
Other: includes personal, in transit, and other.

MAP OF ONTARIO'S TRAVEL REGIONS

[1] Source: Special ITS Overseas Tabulations, MTCR, page M53-1.
[2] Source: Special ITS Overseas Tabulations, MTCR, page S1-1.
[3] See Statistics Canada border crossing statistics, 2000.
[4] Source: Special ITS Overseas Tabulations, MTCR, page P39-1.
[5] Source: Special ITS Overseas Tabulations, MTCR, page P1-1.
[6] Source: Special ITS Overseas Tabulations, MTCR, page P2-1.
[7] Source: Special ITS Overseas Tabulations, MTCR, page P1-1.
[8] Source: Special ITS Overseas Tabulations, MTCR, page P39-1.
[9] Source: Special ITS Overseas Tabulations, MTCR, page M51-1.
[10] Source: Special ITS Overseas Tabulations, MTCR, page P18/19-1.
[11] Source: Special ITS Overseas Tabulations, MTCR, page P19-1.
[12] Source: Special ITS Overseas Tabulations, MTCR, page P7-1.
[13] Source: Special ITS Overseas Tabulations, MTCR, page P-35-1.
[14] Source: Special ITS Overseas Tabulations, MTCR, page P49-2.
[15] Source: Special ITS Overseas Tabulations, MTCR, page P50-1.
[16] Source: Special ITS Overseas Tabulations, MTCR, page M40-1.
[17] Source: Special ITS Overseas Tabulations, MTCR, page P16-1.
[18] Source: Special ITS Overseas Tabulations, MTCR, page R2; M37-1/4.
[19] Source: Special ITS Overseas Tabulations, MTCR, page P42-1.
[20] Source: Special ITS Overseas Tabulations, MTCR, page M55-1.
[21] Carrier fares are assigned to ports of entry/exit within the ITS. If a visitor entered/exited Canada in a province other than Ontario, only a portion or none of their domestic carrier fares would be attributed to Ontario.
[22] Pleasure travel within the overseas market segment represents 43% of all trips and spending by these visitors represents 38% of the total spent in the province in 2000. VFR overseas travel represents one-third (33%) of all overseas travel and just under one-third of all spending in Ontario (31%). Excludes domestic carrier fares to/from Canada.
[23] Source: Special ITS Overseas Tabulations, MTCR, page P14-1.